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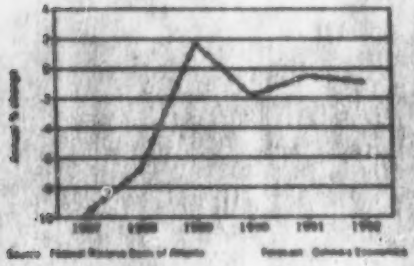
Exports Will Be Major Source of Growth in 1991



The Atlanta Federal Reserve Board's trade-weighted dollar lost 4.1% of its value since the beginning of 1990, but the slide is likely to level off by the beginning of 1991. Assuming a stable political situation, U.S. exchange rates should not fluctuate much over the next few years. The dollar is currently undervalued when measured by purchasing power parity; high U.S. inflation relative to our major trading partners will prevent any substantial revaluation.

The low value of the dollar is the result of a narrower spread between foreign and domestic interest rates as well as the lack of confidence in the U.S. economy. Budget problems and the Savings and Loan crisis add to the uncertainty over future monetary policy. Finally, the volatile political situation in the Middle East could also be a factor in setting the dollar's value on the foreign exchange markets.

Buoyed by a weak currency, manufacturing exports continue to grow faster than imports. In total, U.S. exports have grown at a double-digit rate for the past three years. As a result, exported goods and services now account for 15% of the production in our economy, up from 10% just five years ago. The trade deficit, currently just over $105 billion in nominal dollars, will fall only slightly in 1991 because of a higher oil bill. Net exports, based on national income accounts, will post a smaller deficit because they include services.

Exports still remain one of our best hopes for economic growth in 1991. The economies of most Pacific Rim and European countries are projected to grow significantly faster than the U.S. in 1991. As long as the dollar remains at favorable levels—and a weak U.S. economy coupled with falling interest rates should assure this—we will continue to make inroads with exports.

According to the Commerce Department's final revision of GNP figures, the economy grew 1.4% at an annualized rate in the third quarter of 1990. While slightly less than the original estimate, most sectors saw growth during this quarter. Consumer spending managed to post a 2.7% annualized gain, while business investment rose 8.9%. Early fourth-quarter figures indicate the economy has deteriorated substantially since early October. Expect the downturn to last just two quarters. Since the slowdown has been with us for so long, however, businesses have made the necessary adjustments and shouldn't have to scale back much more to get through this rough period.

GENERAL ACTIVITY INDICATORS

				Annual Percent Change			
Selected Economic Indicators	88/89	89/90	90/91	1989	1990	1991	1992
Gross National Product (1)	4239.7	4355.1	4470.0	2.5	1.1	0.9	3.1
Consumer Spending (2)	2625.3	2678.8	2696.8	1.9	1.0	1.3	2.5
Business Investment (3)	513.3	508.4	539.3	3.9	1.8	1.8	4.3
Industrial Production (2)	108.1	108.4	110.4	2.6	1.4	2.5	3.3
Prime Rate (3)	10.7	10.0	10.0	10.9*	10.0*	9.3*	10.3*
Consumer Price Index (4)	124.7	129.3	133.6	4.8	5.4	5.0	3.1
	88/89	89/90	90/91	1989	1990	1991	1992
Industrial Production (2)							
Printing & publishing	108.3	110.2	110.0	4.8	3.1	4.1	3.6
Paper & wood	97.5	96.6	98.3	-0.6	0.1	1.3	1.7
Food, textile, leather, apparel	101.7	104.7	105.8	10.4	5.7	4.7	5.0
Job creation	108.0	111.6	112.7	4.3	3.4	4.9	5.1
Industry Segments (2)							
Manufacturers, textiles, apparel/leather	na	na	na	7.9	3.8	8.4	3.5
Chemical products & petroleum	na	na	na	4.3	10.5	9.2	5.8

(1) Seasonally adjusted annual rate, billions of 1982 dollars. (2) Index, 1987 = 100. (3) Average percent. (4) Index, 1982 = 100.
(5) Billions of current dollars.
na = data not available for publication. * = annual average.
data source: U.S. Department of Commerce, National Income Report
all forecasts: Colonial Economics

Catch-All, But Catchy

This one (vast) group manages to reflect the diversity of the entire U.S. printing industry.

Commercial / specialty printing. If it sounds like a mouthful, consider this: the category, devised by the folks at Print Markets (published by Trade and Technology Press, Stamford, Conn.) includes everything that doesn't come under any other of the more obvious headings we will review in our 1991 series of Print Market Reports.

According to Trade & Technology Press, printers who are *not* printing the following items—books, greeting cards, magazines, advertising, financial, catalogs, direct mail, inserts, labels (covered in January) or business forms—must be engaged in printing commercial/specialty work.

This catch-all category to a large extent includes types of printing that include unusual bindings, shaping of materials, and specialized applications such as scratch-off game cards. It also includes quick printing when done on a massive scale, such as Curtis 1000's stationery business, or one of the several units of Graphic Industries Inc. which handle blueprinting and copying services.

The rationale behind this category, and the entire Print Markets approach to printing business analysis, is worth examining. Anup Hooja, the editor of Print Markets, and Ashok Anand, publisher, proposed in 1986 that the Standard Industrial Classifications (SIC codes) used by the United States Department of Commerce do not reflect the real world of print manufacturing. Commerce combines magazines, advertising, direct mail, labels, inserts and catalogs, into a single SIC category that it calls "commercial printing", part of SIC Code 27.

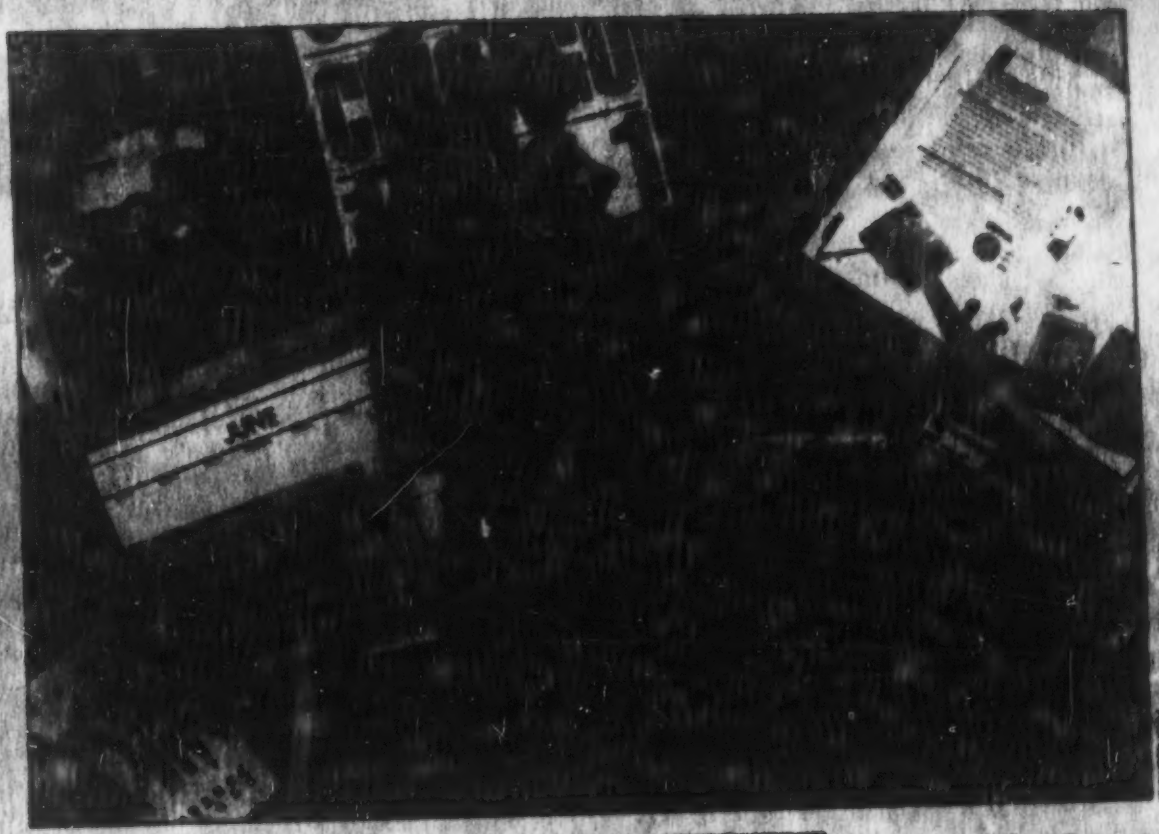
Labels and wrappers can be found under SIC 26, packaging. The Print Markets approach has been to try to ferret out, via questionnaires and surveys, the volume of printing as it plays out in market segments, using the common, everyday names we in the industry apply to various markets. Print Markets takes data derived from its own research, correlates it to Commerce data, and provides figures that add up to the same totals as the government figures, but which can be broken down into more meaningful groups.

Commercial/Specialty printing, however, is such a large grouping, with such disparate elements, it ends up reflecting very much the diversity of the printing industry as a whole.

The basic general commercial printer is in there [the category]," says Hooja. "The focus of his business is stationery and cards and all the little stuff. And the pure specialty people are in there. These are people who do screen printing, or out-of-the-ordinary sizes like maps and posters, or who print on plastics, things like that."

But few printers would describe themselves as "commercial/specialty" printers. Instead they see themselves as falling into one of these categories or as printers of these products: point-of-purchase (P-O-P); calendars; maps; yearbooks; business cards/stationery; gift wrap;

By Bill Esler
Art Direct Editor



printed packaging; annual reports; screen printing; lottery and event tickets; playing cards; baseball cards; printing on plastics; and quick printing.

Some printers are obviously specialty type printers. Imprinting pencils, key chains, selling printed novelties along with conventional products such as Amsterdam (N.Y.) Printing and Litho Corp. The 92-year old company reports $26 million in sales of labels or printing "odds and ends," and carries on an aggressive direct-marketing program to reach customers nationwide.

Day Ti[illegible]s another familiar name, categorized as a commercial specialty printer by Print Markets. The privately-held company does $12[illegible] million in sales of its time organizing tools, including the wall charts and dividers followed by salespeople and production managers alike.

Screen Graphics Inc., a Minneapolis-based unit of Bemis Co., makes a mixture of labels and sales support materials such as point-of-purchase displays. The company pursues a "total source" concept for its customers, whether they need labels, labeling systems, point-of-purchase, or screen-printed specialties or exhibits.

Typical Products

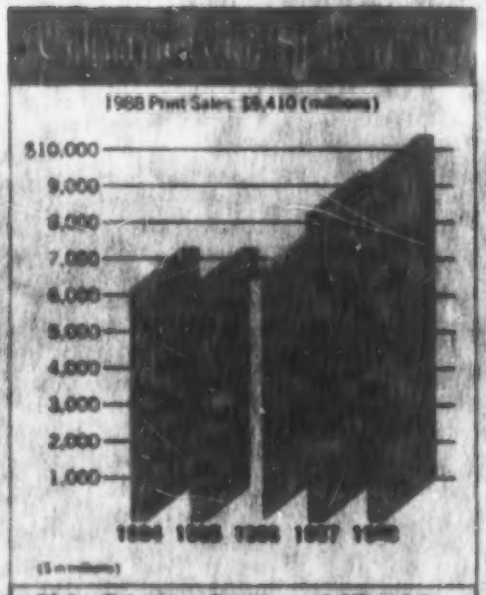
Point-of-Purchase Materials
Calendars and Diaries
Maps and Posters
Booklets
Business Cards and Stationery
Gift Wrapping
Annual Reports
Lottery and Event Tickets
Playing Cards
Baseball and Sports Cards
Quick Printing

Typical Users

Consumer Goods Manufacturers
Retail and Wholesale
Food Processors
Toys, Novelties
Consumer Service Companies
Publishers
Financial Institutions
Travel Agencies

Cincinnati's The Henrygus Co. is well known as an award-winning commercial printer, but the company also has a thriving business in point-of-purchase displays. It's niche focuses on producing dimensional stand-up promotions for movie companies—the life-sized Stallones and Jean-Claude Van Damme figures you'll find in theater lobbies. This is a product tradition that dates to the company's beginnings more than a century ago as a poster printer for Vaudeville shows, starring players, and the circus.

Using large format die-cutting and embossing presses, Henrygus forms and shapes its products, like so many of the printers in the commercial printing category.



Major Printers—Commercial/Specialty

Rank	Company	Sales in millions
1	Stone Container Corp.	485.9
2	James River Corp. of Va.	475.0
3	Hallmark Cards, Inc.	195.0
4	Jostens Inc.	140.0
5	Jefferson Smurfit Corp.	137.0
6	Rand McNally & Co.	130.0
7	Day Timers Inc.	125.0
8	Walcraft Technologies Inc.	115.0
9	Artkive	107.0
10	Bagcraft Inc.	105.0

Frederic Printing in Aurora, Colo., fits the commercial/specialty category quite completely. "We do general commercial printing, and we also get into annual reports," notes Richard Scott, the company's general manager. "We get into packaging for the cosmetic industry. And then we do a lot of resort community brochures—rack brochures and flyers." Frederic produces corporate communications materials, and markets brand with Wire-O (in-house) or three-ring binders (purchased from outside).

"We're completely self-contained, from design all the way through fulfillment," says Scott. "Everything is done in-house." This includes presentation folders, which are diecut, stamped, embossed, and glued on the premises. "We even do a couple of magazines, and limited art prints, posters, calendars, anywhere from single-sheet to Wire-O bound to stitched." The $13.5 million, family-owned company, founded in 1878, sees about two-thirds of its varied volume falling into the all-encompassing commercial/specialty area.

Much more concentrated in its focus of activity is Horticultural Printers, Mesquite, Texas. The company was founded in 1957 to produce those familiar plastic tags found on house-plants—the ones with a color picture of the plant (always in perfect health!) on one side, and care directions on the other.

"We also do flexo pressure sensitive labels," says Horticultural's Larry King. These are used for bar coding. "Other than that, we are a general commercial printer. We have several webs, and we do schoolbooks, publications, and posters. But our specialty is the horticultural labels."

Perhaps the most specialized of the specialty printers we encountered was Decor Gravure, a $10 million printer based in Fairfield, Ala. Decor specializes in gravure printing of wallpaper products, used in manufacturing RVs and prefabricated housing. Printing anything from two- to five-color, Decor Gravure produces 50¼" material that is applied to wallboards and other materials.

"We're a little different than everybody else. We also laminate," says Dale Glasscock, president. "We laminate and distribute as a finished product." Right now the company is working on lamination services for Winnebago's 1992 models. "Our approach is to buy artwork and then adapt it to the scale and repeat for the industry that we serve. We buy about three times a year, in New York, France, and Germany."

Decor Gravure works with its customers in the prefabricated housing marketplace to, "try to develop products in tune with what they believe the market is demanding. And areas of the country differ. What sells in California may not sell in Pennsylvania. So we are very regionalized in some of our concepts."

Printers approach their printing and their markets in one of four strategies, according to the Print Markets report:

- They may be *full line/all market* suppliers serving all market segments with a full range of products. This description would fit Frederic Printing.
- They may *aim a full line of products at a particular market segment*, such as Screen Graphics does for screen-printed label users.
- Alternately, printers may *specialize in a specific product*, as with Day Timers, *selling to all markets*.
- Finally, printers may *specialize in a particular type of product for a specific market segment*, such as highly-focused Decor Gravure does.

Of the many types of printing specialists, the commercial/specialty group identified by Print Markets exhibits these four major strategies most clearly. And it is a group that reflects the variety and diversity of the U.S. printing industry. This, in turn, is a product of print's versatility, which is one of the industry's greatest strengths, and one that will likely continue to drive this segment's success regardless of what's going on in the rest of the economy. GI

Upbeat Economy Stays Strong

Whatever it is that's happening in the overall U.S. economy, a lot more of it is happening some places than others. We kicked off this series with a look at the New England region, where slumping profits and fierce, knuckled competition have printers seeing a decidedly gloomy picture.

According to our survey findings, things look significantly brighter in the generous South Atlantic region, which sprawls from just south of Philadelphia all the way down to Key West, embracing eight states and the District of Columbia.

One reason for this is simply that things are better in the South Atlantic; compared to New England, printers in this region showed larger sales increases (1989-1990), higher profitability, and less idle capacity.

Partly that's because the Northeast has been hit by declines in some of its major industries, particularly computers in New England and financial services in the New York City area. There's also been a general contraction in the Northeast's real-estate market.

However, it's too simple just to say that people have quit living

nightmare commutes and million-dollar tract housing while they're still drinking orange juice and flying down to Disney World. If you look carefully at the numbers in this report, you will see that the real secret to the strength of a region like the South Atlantic (and others we'll get to during the year) can be revealed in one word: growth.

With the exception of northeastern Pennsylvania and the state of West Virginia, all these states are growing in population and growing swiftly, not having been because it's worse; they're moving because there are jobs there. Industry—and thus the general economy—is growing right along with the population.

The fortunes of general commercial printing, the classic, quintessential business-service industry, are inextricably bound to the fortunes of its customers. It is these customers who make up the growing economy of the South Atlantic region, and it is their success that accounts for the probably rosy mood of the region's printers.

But don't get us wrong: everything is not perfect in the region, any more than everything is awful north of it. We notice, however, that while sales and profitability numbers for the region are somewhat higher, the confidence index is a lot higher. There may be competition, recession, and the threat of war, but a growing economy apparently makes it a lot easier to take them in stride.

The most revealing portions of our data presents survey [illegible] among commercial printers. It shows sales changes from 1989 to 1990, the extent of those changes, profitability and capacity comparisons, and [illegible]

Reports of this [illegible] of Print Market Trends may be obtained from Cahners Publishing Company, Department 4200, 1350 E. Touhy Ave., Des Plaines, Illinois 60018 or phone toll-free 800-323-4588.

By Peter Johnson
Special Projects Manager

Regional Overview

The printing industry is an important factor in the economy of the South Atlantic region, offering a variety of employment opportunities and revenue sources, as well as contributing to the local tax base. Among larger printers, commercial printing is the leading market segment, followed by inserts, financial and legal printing, and magazines. Dollar figures given throughout this report are unadjusted for inflation.

COMMERCIAL PRINTING

Value of Shipments

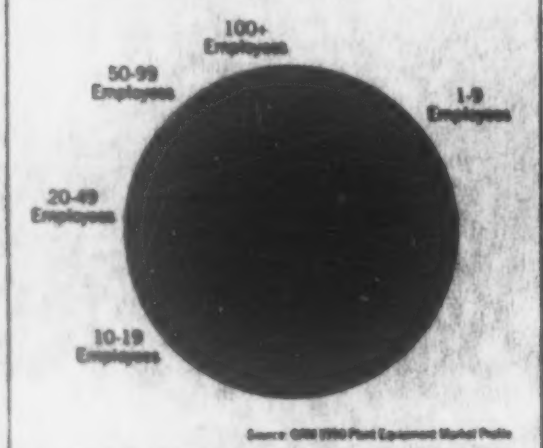
State	Sales, 1990 ($ million)	% of Region	Sales, 1989 ($ million)	% change (1989-1990)
Florida	$2,742	23.4%	$2,566	7.3%
Georgia	2,187	18.7%	2,005	9.0%
Virginia	1,970	16.8%	1,829	7.7%
Maryland	1,873	15.9%	1,743	7.4%
N. Carolina	1,728	14.8%	1,594	8.4%
S. Carolina	628	5.4%	579	8.4%
D. of Columbia	237	2.0%	221	7.2%
W. Virginia	218	1.9%	206	5.8%
Delaware	131	1.1%	121	8.2%
TOTAL	$11,714	100%	$10,864	(Average) 7.9%

Source: PIA Economics Department

Printing Sites

State	Sites
Florida	1,724
Georgia	1,600
North Carolina	765
Virginia	669
Maryland	656
South Carolina	282
West Virginia	183
Delaware	69
TOTAL	6,098

All Graphic Arts Plants, by Employee Count



Source: GAMA 1990 Plant Equipment Market Profile

Charts and graphs by Lisa Halgren

All Graphic Arts Plants, by Function

Function	# of Plants
Commercial	3,934
Newspaper (w/Commercial)	205
Newspaper (w/o Commercial)	262
Book & Pub	372
Business Forms	107
Converters	252
Noncommercial	1,233
Trade	556
Quick Printers	835

Source: GAMA 1990 Plant Equipment Market Profile

DEMOGRAPHICS

The South Atlantic region is the second most populous in the U.S., after the East North Central. More than a quarter of the people here (just over 28%) live in Florida, one of the five largest states, the others being California, New York, Texas, and Illinois, and also one of the most rapidly growing (along with California and Texas).

Population and Population Changes

State	Population	Rank	Change (1980-90)
Florida	11,675,000	5	19.8%
North Carolina	6,335,000	10	7.3%
Georgia	6,104,000	11	11.7%
Virginia	5,787,000	13	8.2%
Maryland	4,463,000	19	5.8%
South Carolina	3,377,000	24	8.2%
West Virginia	1,918,000	34	-1.8%
Delaware	633,000	47	6.9%
DC	626,100	—	-1.9%
TOTAL	40,916,000		

Educational Attainment

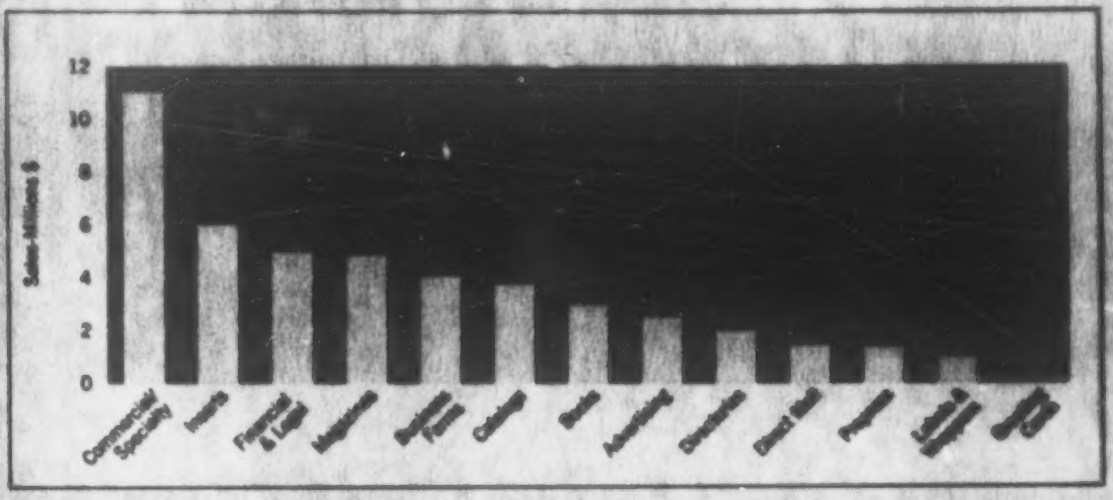
State	High School Graduates	College Graduates
U.S. Average	66.5%	18.0%
Delaware	68.6%	17.9%
Maryland	67.4%	25.4%
DC	67.1%	27.5%
Florida	66.7%	14.5%
Virginia	62.4%	19.1%
Georgia	55.4%	14.8%
West Virginia	56.0%	10.4%
North Carolina	54.8%	13.2%
South Carolina	53.7%	13.6%

Source: U.S. Department of Commerce, Bureau of the Census

Market Profile

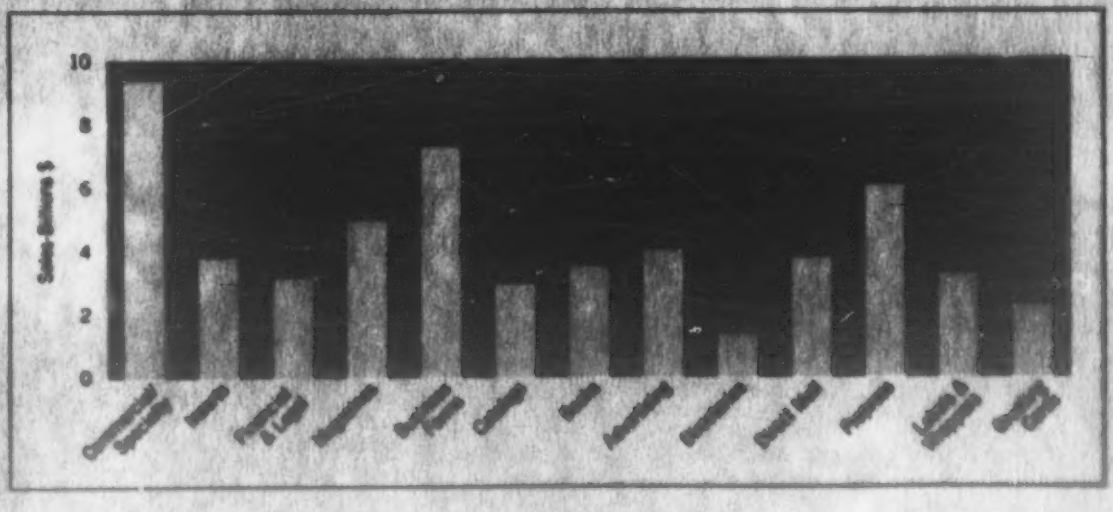
Ranking of Product Segments . . .

The presence of a diverse and broad-based economy with a high representation of consumer products and tourism account for the commercial printing segment leading all others in the South Atlantic. The presence in the region of a small number of very large insert plants make this segment number two, closely followed by financial and legal, magazines, and business forms. These bar charts are presented in similar order to simplify comparison between segment concentration in the South Atlantic and the U.S. All figures here are based on 1989 data.

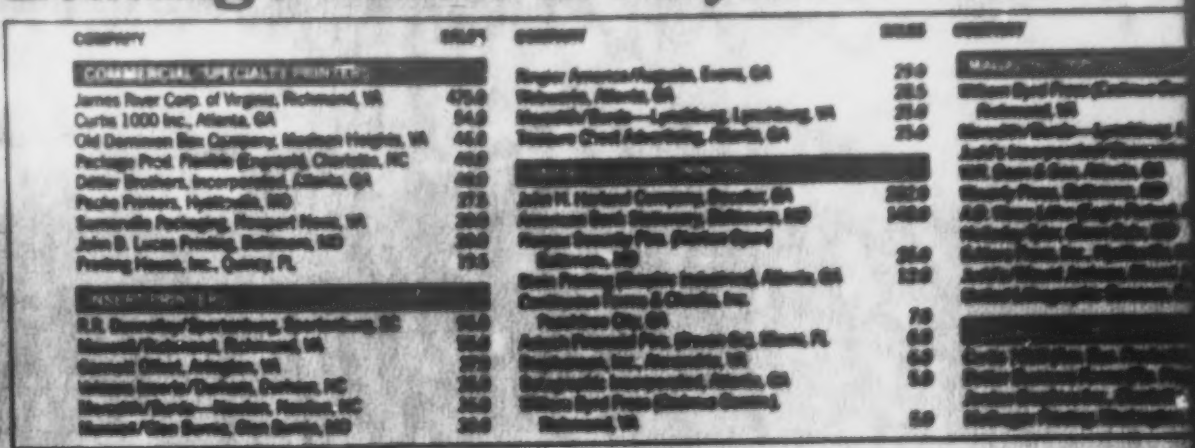


. . . Compared to National Totals

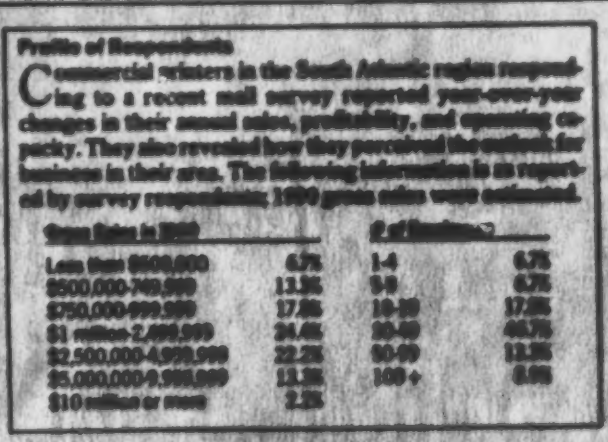
Just as in the South Atlantic, the commercial printing segment leads all 13 product categories by size, accounting for some $9.4 billion in annual sales (following the parameters of this study). Free-standing inserts are the sixth-largest overall, financial and legal rank tenth, and magazines fourth. In other segments, the structure of the industry in the South Atlantic is at least a rough match for that of the overall U.S. Greeting cards, one of the smallest segments, is insignificant in the South Atlantic, and is thus not represented here.

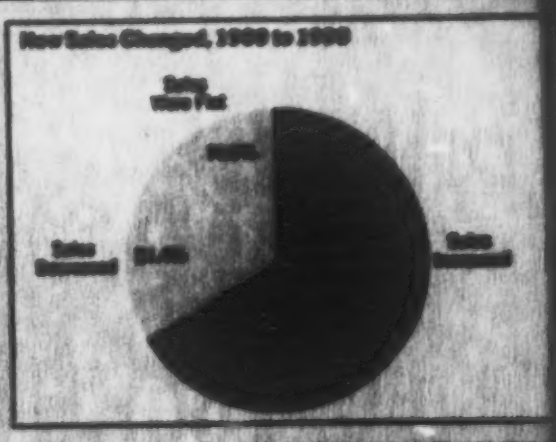


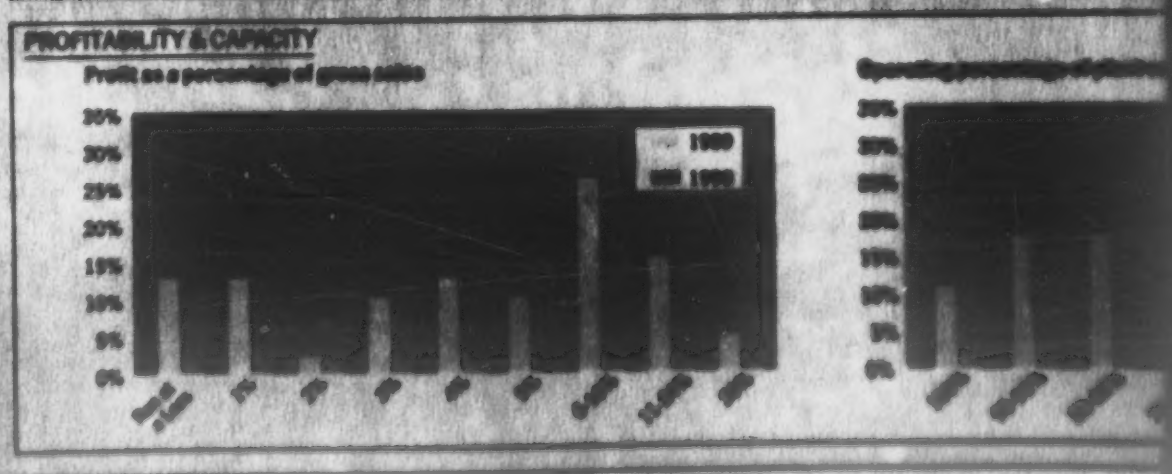
Leading Printers in Major Markets



How Printers Are Doing


Profile of Respondents
Commercial printers in the South Atlantic region responding to a recent mail survey reported year-over-year changes in their annual sales, profitability, and operating capacity. They also revealed how they perceived the outlook for business in their area. The following information is as reported by survey respondents; 1990 gross sales were estimated.
Less than $500,000 6.7% 1-4 6.7%
$500,000-749,999 11.1% 5-9 6.7%
$750,000-999,999 17.8% 10-19 17.8%
$1 million-2,499,999 24.4% 20-49 46.7%
$2,500,000-4,999,999 22.2% 50-99 11.1%
$5,000,000-9,999,999 13.3% 100+ 6.9%
$10 million or more 2.2%





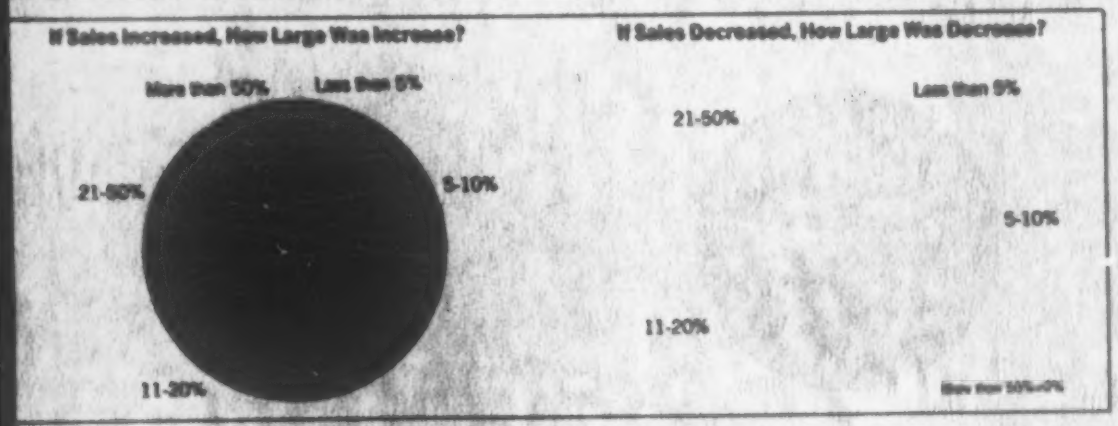
COMPANY	SALES
m.)	
	59.5
ichburg, VA	55.0
, Strasburg, VA	43.0
	39.0
	36.1
Tyrone, FL	25.0
	24.0
	21.0
ham, VA	20.0
Church, VA	17.0
Atlanta, GA	79.6
Largo, FL	48.0
C	45.5
C	37.0

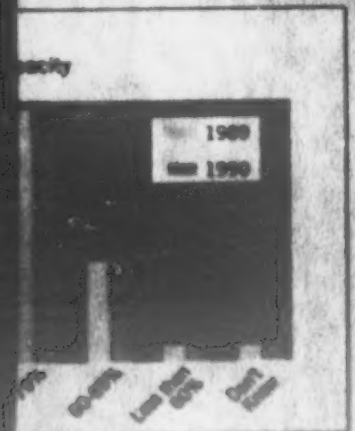
COMPANY	SALES
Sturgis Newport Business Forms, Hampton, VA	33.0
Chapman Printing Company, Huntington, WV	24.0
Woodbury Business Forms, Inc., LaGrange, GA	23.0
Datagraphic Incorporated, Atlanta, GA	21.5
Computer Ptg. (Cullman Ventures), Fredricksburg, VA	18.0
Electronic Data Magnetics, High Point, NC	16.5
CATALOG PRINTERS	
Meredith/Burda—Lynchburg, Lynchburg, VA	70.0
Meredith/Burda—Newton, Newton, NC	64.0
Fosta & Davies Inc., Atlanta, GA	60.0
R.R. Donnelley/Spartanburg, SC	60.0
Rieger America/Augusta, Evans, GA	40.0
Avanti Press, Miami, FL	21.0
Judd's Incorporated/Shenandoah, Strasburg, VA	10.0
Hickory Printing Group, Inc., Hickory, NC	6.0
Graphic Productions Company, Miami, FL	6.0

COMPANY	SALES
BOOK PRINTERS	
R.R. Donnelley/Harrisonburg, Harrisonburg, VA	95.0
Banta Company (Banta), Harrisonburg, VA	40.0
Port City Press, Pikesville, MD	32.0
Berryville Graphics (Bertelsmann), Berryville, VA	20.0
Optic Graphics, Glen Burnie, MD	17.0
ADVERTISING PRINTERS	
Williams Printing (Graphic Indus.), Atlanta, GA	20.0
American Graphics (Cadmus Comm.), Atlanta, GA	18.9
Gold Coast Graphics Group, Sunrise, FL	17.0
Goodway Graphics of Virginia, Springfield, VA	16.5
Avanti Press, Miami, FL	15.0

Selective listing, which table above only the corporate sizes of larger plants in larger segments, in from *Printmarkets*, Trade & Technology Press, Newtown, Conn., based on data provided by firms involved. Sales in millions.

Based on a survey of firms in the region, conducted by Colwurs Publishing





Comments by Printers

South Atlantic respondents describe a variety of business conditions in their area and offer suggestions for their causes:

- Some large businesses closed down due to over-investment. Others are holding their own.
- Most printers investing in new equipment.
- The trend is towards quicker turnaround regardless of the difficulty of the job.
- Things seem to have leveled off due to the change in economy and increasing competition.